



**STATE ASSESSORS BOARD  
REGULAR MEETING MINUTES OF NOVEMBER 16, 2007  
Bond Finance Board Room, Richard H. Austin Building  
430 West Allegan Street, Lansing, Michigan**

**CALL TO ORDER:** The November 16, 2007 meeting of the State Assessors Board was called to order at 9:30 a.m. in the Bond Finance Board Room in the Richard H. Austin Building, 430 West Allegan Street, Lansing, Michigan.

**ROLL CALL:** Members present: Lisa A. Hobart, Chairperson  
Henry O. Allen, Vice Chairperson  
Maxine J. McClelland, Member  
Frederick W. Morgan, Member  
Raman A. Patel, Member

Staff present: David C. Lee, Executive Secretary

**APPROVAL OF MINUTES:** It was moved by Patel, seconded by McClelland, and unanimously approved to adopt the regular meeting minutes of the October 26, 2007 meeting of the State Assessors Board as presented.

**PUBLIC COMMENT:** There was no public comment.

**FINANCIAL REPORTS:** Financial reports relating to State Assessors Board operations for the months of April 2007 through September 2007 were received by the Board.

**EDUCATIONAL PROGRAMS:**

1. It was moved by Patel, seconded by McClelland, and unanimously approved to give approval for six hours of annual certification renewal credit for an Oakland University course titled "REA112 General Market Analysis Highest and Best Use". (This renewal credit cannot be applied toward the 2007-2008 annual renewal requirement.)
2. It was moved by Patel, seconded by McClelland, and unanimously approved to give approval for level 3 and level 4 course credit and for six hours of annual certification renewal credit for an Oakland University course titled "REA111 Statistics in Appraisal". (This renewal credit cannot be applied toward the 2007-2008 annual renewal requirement.)
3. It was moved by Morgan, seconded by Allen, and unanimously approved to grant approval to the level 3 experience qualification requests of Ms. Peggy A. Lidgard, Ms. Lora Osterman, Ms. Alisa J. Petronski, and Mr. Christopher T. Smith.

**CERTIFICATION APPLICANTS:** It was moved by Morgan, seconded by Allen, and unanimously approved to grant formal approval to the list of certification applicants provided to the Board. The list of certification applicants which was approved by the Board and the certification totals presented to the Board were as follows:

**CERTIFICATION APPLICANTS (Continued):**

**Certification Applicants  
November 7, 2007**

**Level 1**

Girling, Tamara

Schwartz, Elizabeth

Vince, Karen E.

**Level 2**

DeBoe, Diane J.

McKenzie, Debra

Plesha, Sheri A.

**Level 3**

Angle, Jennifer  
Frain, Matthew S.

Koning, Frederick L.

Welch, Darcy J.

**Certification Totals  
November 7, 2007**

Level 1	608
Level 2	976
Level 3	880
Level 4	<u>148</u>
<b>Total</b>	<b>2,612</b>

**CLOSED MEETING:** A closed meeting was permissible under the Open Meetings Act, Michigan Compiled Law (MCL) 15.268(h). (See also the Freedom of Information Act, MCL 15.243(1)(b)(ii), 15.243(1)(d), and 15.243(1)(k) and the Open Meetings Act, MCL 15.267(2).) A motion was made by Morgan and seconded by Allen to go into closed session. A roll call vote occurred: Hobart—yes, Allen—yes, McClelland—yes, Morgan—yes, and Patel—yes. The motion was unanimously approved.

A closed session was held and the following items were discussed by the Board:

1. Closed meeting minutes from October 26, 2007
2. October 2007 course examinations
3. Revocation petition 07-0024
4. Revocation petition 07-0025
5. An over-certification situation involving an assessing officer
6. The Advanced Income Approach examination results of a level 4 candidate
7. Proposed level 4 oral examination policy/procedure and proposed level 4 oral examination

### **CLOSED MEETING (Continued):**

A motion was made by Morgan and seconded by Patel to return to open session. A roll call vote occurred: Hobart—yes, Allen—yes, McClelland—yes, Morgan—yes, and Patel—yes. The motion was unanimously approved.

### **OPEN MEETING ACTIONS ON CLOSED MEETING ITEMS:**

1. It was moved by McClelland, seconded by Patel, and unanimously approved to adopt the closed meeting minutes of October 26, 2007 as presented.
2. It was moved by Patel, seconded by Morgan, and unanimously approved to approve the October 2007 course examination results.
3. It was moved by Morgan, seconded by Allen, and unanimously approved to request the Assessment and Certification Division to investigate the allegations contained in revocation petition 07-0024.
4. It was moved by Morgan, seconded by Allen, and unanimously approved to request the assessing officer named in revocation petition 07-0025 to answer the allegations contained in the petition in writing, with the assessing officer being asked specifically to address the assessing officer's reasoning for asking the State Tax Commission to add property as omitted property after that property had been included as part of the valuation of the parcel by the Michigan Tax Tribunal.
5. No action was taken by the Board regarding the over-certification situation involving an assessing officer, it being anticipated that the situation would be handled through a future revocation proceeding.
6. It was moved by McClelland, seconded by Morgan, and unanimously approved to grant the level 4 candidate an extension to complete all level 4 certification requirements.
7. It was moved by Patel, seconded by Morgan, and unanimously approved to adopt the level 4 oral examination policy/procedure as presented and to approve the 50-question level 4 oral examination as presented. The oral examination policy/procedure adopted by the Board called for a level 4 oral examination with a standard portion to contain 50 questions, with level 4 candidates to be notified (prior to the examination) of the general topics covered by the standard portion of the oral examination, and with the opportunity for a level 4 candidate to retake the oral examination if a passing score is not initially achieved.

**COMMUNICATIONS:** A communication from Ms. Laureen A. Birdsall inquiring about the potential for a conflict of interest associated with consulting work was received by the Board.

### **OTHER BUSINESS:**

1. The Executive Secretary outlined plans for the filling of a position funded by State Assessors Board funds. It was moved by Allen, seconded by Morgan, and unanimously approved to support the filling of the position.

## **OTHER BUSINESS (Continued):**

2. Extensive discussion occurred regarding assessing officers exceeding their certification authority (i.e., the over-certification of value by assessing officers). Discussion also occurred concerning various certification situations and how those situations should be handled in determining whether an assessing officer has over-certified value. Action regarding three certification situations was as follows:

- It was moved by Patel, seconded by Allen, and unanimously approved that, in situations where an equalization director is also the assessor of record for one or more local units within that equalization director's county, the state equalized value of the local unit(s) is not to be counted in addition to the state equalized value of the county in determining whether the equalization director has over-certified value.
- It was moved by Patel, seconded by Allen, and approved by a vote of three to two (McClelland and Morgan voting no) that, in situations where an equalization director is the assessor of record for one or more local units outside that equalization director's county, the equivalent state equalized value of the local unit(s) is to be counted in addition to the state equalized value of the county in determining whether the equalization director has over-certified value.
- It was moved by Patel that, in situations where an equalization director is the assessor of record for one or more local units outside that equalization director's county, the certification level requirements for counties are to be used (as opposed to the separate certification level requirements for cities and townships). The motion was not seconded and was withdrawn.

## **ANNOUNCEMENTS:**

1. The next meeting of the State Assessors Board is scheduled for December 21, 2007 at 9:30 a.m. in the first floor Bond Finance Board Room of the Richard H. Austin Building, 430 West Allegan Street, in Lansing.

2. Mr. Valdemar L. Washington will begin work as the next Deputy Treasurer, State and Local Finance, on December 3, 2007.

**ADJOURNMENT:** It was moved by Patel, seconded by Morgan, and unanimously approved to adjourn the meeting. The meeting adjourned at 11:25 a.m.

**Date minutes typed: November 30, 2007**

**Date minutes approved:** 12-21-07

  
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Lisa A. Hobart, Chairperson